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AUTHOR Fiste, David A.
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ABSTRACT

Focusing on cataloging operations contingent upon public catalog usage, this article identifies necessary components of a collection access policy, discusses representative samples of policies that can be adapted to individual library practices, and provides guidelines for the development and implementation of a statement useful for planning future services. Sections include catalog and file maintenance, AACR2 impact, retrospective conversion, departmental workflow, special materials, OCLC usage, classification, descriptive cataloging, and backlog control. A 5-year (1979-1983) literature survey provides current documentation. In addition, background information and commentary are included. Guidelines are formulated as a basis for developing a written manual for library staff usage. (Author/DMC)

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COLLECTION ACCESS POLICY

BY

DAVID A. FISTE

Head, Catalog Unit
Robert Muldrow Cooper Library
Clemson University
Clemson, S.C.

ED246908

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David A. Fiste

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ABSTRACT

Collection access is primarily associated with public catalogs. This policy statement examines those cataloging operations contingent upon catalog usage. Sections include catalog and file maintenance, AACR2 impact, retrospective conversion, departmental workflow, special materials, OCLC usage, classification, descriptive cataloging, and backlog control. A five-year literature survey provides current documentation. In addition, background information and commentary are included. Guidelines are formulated as a basis for developing a written manual for library staff usage.

COLLECTION ACCESS POLICY

BACKGROUND

Definition

Collection access is the means by which a user determines information regarding library materials. The card catalog is the traditional tool used to provide such data as description of the item, entries (by name, title, subject, or series), classification, location, and holdings. Similar in nature are manual files, indexes, and lists. Consulting staff or automated systems may be alternative or supplemental approaches.

Research

Resources and Technical Services Division committees have developed guidelines for collection development¹ and for collection evaluation² to date. However, an extensive literature search³ reveals no foundation upon which to build a library collection access policy. The term "collection access" does not appear, while "cataloging policy statements" deal only with quite specific topics. Library of Congress publications are the chief sources cited.⁴

Scope

As a result, a need is demonstrated for formulating a statement of collection access policies for an individual library. Treatment is intended to be comprehensive, covering all phases of cataloging operations. Documentation is limited to a five-year period (1979-1983) in order to provide current information; bibliographic citations are included to give perspective to an issue.

Audience

Usage of this statement will be limited primarily to library staff at all levels. Library administrators need to be aware of the decision-making process involved in daily cataloging practice, and can use an in-house manual as a record of past decisions. Department heads will be able to examine the interrelationship between library processes. Catalogers should find policy statements invaluable for establishing procedures and determining rationale for projects. Staff can consult the guidelines before performing operations, and could use the library's collection access policy as a resource for explanation to library users.

Assumptions

An academic library serves as model, although the pattern is adaptable to other types of libraries as well. For the library the following assumptions are implicit: cataloging is based on Library of Congress copy; AACR2 is implemented; a retrospective conversion project is underway using grant monies; OCLC network services are used; a union catalog will remain the primary access tool for several years; an integrated automated library system is planned, with an online catalog and back-up file as a long-range goal; and no additional staff will be hired.

Institutional goals will be achieved; within the university setting, a library supports instructional and research programs by organizing for use the library materials. Cataloging provides bibliographic control of these items in order to facilitate access to and subsequent use of the collection; a major responsibility is to respond to changes which show promise of improving the quality and efficiency of the catalog.

Methodology

In theory, "policies provide guidelines for action"⁵ and hence should be instituted at the beginning of a unit's existence. In practice, often a new manager is confronted with oral tradition concerning departmental operations obtained from predecessors and colleagues. Instructions must be formulated for such management tools as procedure manuals, work flow-charts, training manuals, job descriptions, memoranda, and special reports. If many practices are inherited from the past, an alternative approach could be to prepare a collection access policy as a composite of these documents compiled beforehand.

Purpose

A policy statement is a useful communications device. Information is arranged systematically and put into writing for others' use. A clearly articulated collection access policy will increase uniformity throughout the library system of an institution and enhance understanding of the underlying philosophy. Remember that a policy must be formulated before it can be examined for relevance, then changed if necessary. Service to catalog users is the primary concern.

Objectives

An immediate aim of this article is to identify necessary components of a collection access policy, discussing representative samples of policies which can be adapted to individual library practices. A long-range objective is: develop and implement a statement useful for planning future services. An issue at hand is automation, since in the long run all current policies will need to be reviewed in relation to new technology.

GUIDELINES

1.0 Catalog and File Maintenance

This section is based upon use of departmental files and their interpretation to others. Consult generalized reading material if available on some of these topics.

1.1 Filing Rules

Choose an appropriate set of filing rules based on user needs. For example, ALA Rules for Filing Catalog Cards⁶ are more applicable to a large library catalog because of the complexity of headings involved, although the "as-if" principle makes human filing mandatory. On the other hand, ALA Filing Rules⁷ are briefer and more useful in a machine-readable catalog because of the "file-as-is" basis; numerical arrangement based on this pattern will gear users toward the online environment. Alphabetical arrangement is further complicated by initialisms and abbreviations⁸ plus symbols.

1.2 Local Filing Practice

Determine special arrangements when rules do not prescribe a pattern. Make a list of local card catalog variations, prepare a format for COMCAT vendors, or profile order of displays for automated systems programmers. For example, holdings for branch⁹ libraries and variant editions require subarrangement, perhaps alphabetically by location and chronologically by date.

1.3 Authority Files

Consider establishing or expanding the name authority file in particular and determine coverage.¹⁰

1.4 Subject Headings

Check subjects against appropriate lists and instructions, to keep headings standardized and up-to-date. Conflicting tracings can be "bumped" at the card catalog as an alternative, but this method requires starting processing all over again for problems found. Local online catalogs will provide subject access and quicker checking capabilities.

1.5 Series Control

Create an authority, either manual or automated, to record local decisions based on user needs. For new series to be added, consider checking bibliographic records (as on OCLC) to determine latest form of entry; with AACR2, most series are now traced under title, and such access is useful for acquisitions and reference purposes. In addition to cross references common to all authority files, a series authority must contain data about treatment(classification, tracing practice, bibliographic history) and may include documentation of sources and factors influencing decisions made.

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1.6 Local Authority Practice

Augment authorities by adding headings for local collections within the individual library. It is recommended that this practice be done sparingly, both to increase standardization and to reduce amount of local file maintenance. Printed listings, as subject headings, can then be placed near the catalog for consultation and to eliminate duplication of effort, for example typing "see also" references.

1.7 Official Catalog

Evaluate the need for an official catalog. The public catalog often includes this file, since all main entries collectively serve this purpose of providing complete and current information. Determine file's location. Establish procedures for correction, since the record contains vital information. It is critical that the corresponding online data be upgraded or "updated" to make the archival tape match the official record.

1.8 Catalog Format

Determine most useful format for a card catalog: in a dictionary catalog, authors or titles identical to subjects will file side-by-side, so access points can be reduced to save space and production costs; however, a divided catalog requires more access points. Online catalogs and COMCATs may be arranged by names, titles, subjects, series, keywords, and call number in addition to local control numbers.¹²

1.9 Security

Exercise caution for catalogs in the public domain, developing procedures in case of vandalism or when files need physical repair. Safeguard a microfilm copy of manual records for insurance purposes and for its value as a permanent record. Remember that archive tapes can serve as a back-up in case of emergency. Consider adoption of a library-wide disaster recovery plan, stating actions needed to protect and salvage valuable records.

1.10 Shelf Lists

Determine the value of maintaining shelf lists housed within the cataloging offices. Integrating current items with call numbers previously assigned plus recording holdings information are two major reasons. A union catalog improves accuracy of "meshing" classification and Cuttering for all library items, whereas special shelf lists for certain collections, branches, and departmental libraries are useful for collection development and statistical purposes.

1.11 Discontinued Collection Files

Keep a file of discontinued collections. For example, a "withdrawn" shelf list could include discards (items removed from collection) and lost items (volumes missing but records remain temporarily). This file can be used for historical purposes: ordering replacement items and conducting inventories are speeded by knowing which materials are no longer available.

1.12 Personnel

Assign appropriate level personnel for filing and revising. For quality control, catalogers and paraprofessionals who are responsible for cataloging decisions should resolve conflicts in the catalog, authority files, and shelf lists. In small libraries, staff may revise the filing of students or other part-time personnel. Discussions at American Library Association conventions have focused on cataloging personnel use.

1.13 Bibliographical Information

Encourage catalogers to "devise and publicize pathfinders, booklists, displays, etc., which will ease access to collections and will motivate use."¹³ A consequence of online catalogs is that catalogers may function more as bibliographers in the future, since records can be reformatted for computer printouts.

2.0 AACR2 Impact

This section indicates fundamental policies underlying AACR2 implementation at a given library. Publication on the topic has been prolific, especially in the area of AACR2 implementation more than its impact on catalog access.¹⁴

2.1 AACR2 Adoption

Adopting the new cataloging code early was done in some libraries.¹⁵ In any case, the advent of a new format always raises the question of whether to adopt new practice or keep and modify old ways.

2.2 AACR2 Implementation

Implementing the new rules meant deciding whether to split card catalog files, and freeze or close the catalog. As a result of studies by individual academic libraries using random-sampling techniques, most determined that maintaining an integrated card catalog seemed the best local option, although methods varied. Some opted for the large-scale revised heading list approach.¹⁶ Others decided to make conflicting headings compatible as cards were filed.

2.3 Combination Approach

Determining procedure then was the next step to handling conflicts. A combination approach of interfiling and card alteration is used most often, reordering cards being done in rare cases.¹⁷ Policy is to avoid split files, which are labor-intensive and cause confusion.

2.4 Subheading Changes

Changing all subheadings when the main heading is changed provides consistency. Cross references are, of course, made when filing place changes. Corporate bodies entered under place cause the most problems.

2.5 Established Forms

Using verified forms of headings is better than "creating" local forms, which may later conflict with established practice. Exceptions should be made only to resolve conflicts, integrate large files, or handle local library needs and ought to be noted in local authority files. A convincing argument is stated for trying to make those responsible for establishing headings to satisfy more user needs; more responsiveness to current and unbiased terms would reduce library workload by decreasing need for local variations, and hence benefit the whole library community.¹⁸

2.6 Cuttering

Altering Cutter numbers to match changed main entries has probably rarely been done, since cards are the initial means of access. Special procedures for processing materials would have to be developed to implement this policy decision otherwise.

2.7 Technical Services Costs

Determining costs of AACR2 implementation has been deferred.¹⁹ These indirect costs need more critical evaluation before policy decisions are made to even prepare revisions to existing codes and formats or create new ones.

3.0 Retrospective Conversion

This section deals with conversion of manual records to machine-readable form. Before embarking on such a project, it is suggested that one attend a workshop²⁰ to learn the ramifications of undertaking retrospective conversion.

3.1 Planning

Examine those factors affecting the rate of conversion.²¹ Review the literature to read reports of projects in progress or completed.²² Talk to others about "recon" underway elsewhere. After careful evaluation of all considerations, develop a plan of action for administrative approval which describes suggested funding sources and your relationship to external agencies, such as any vendors awarded contracts.

3.2 Methodology

Determine which records are to be used in the project. Shelf lists are prime candidates, because files are readily available to staff. If other records (as main entries) are more complete and up-to-date, test the files by comparison to determine which records are best suited to the project.

3.3 Order of Conversion

Convert smaller collections first, in order to get an idea of types of local problems to be encountered; completing a defined section of the shelf list is rewarding, and improves outlook at the onset of the project. Branch catalogs are ideal targets for offline products, such as COMCATs and book catalogs, which improve service and eliminate extensive card production.

3.4 Inventory

Coordinate efforts with Circulation to inventory materials before converting records. There is no sense cataloging an item which is missing from the stacks.

3.5 Editorial Guidelines

Indicate a general pattern for editing records. For example, edit OCLC contributor copy to match local records but accept standardized copy from an authenticating agency. Less decision-making by staff will hasten work.

3.6 Recataloging Project

Estimate the volume involved in reclassification of materials at the time records are upgraded. Often processing workload would be staggering and delay the project. Call number changes done later online would be quicker than manually changing or reordering cards.

3.7 Records Converted

Determine usage of materials before deciding whether to convert all records. Develop interim procedures for non-Roman alphabet items.

3.8 Archival Tapes

Develop procedures for updating any machine-readable records. Choose a cut-off date for direct transfer of records.

3.9 Staff and Scheduling

Consider the advantages of using current staff for bulk of the project, rescheduling them to work non-prime time hours. Hire others and contract work if necessary, too.

3.10 Overall Approach

Establish a philosophy of practice from the start. Perfectionism would bog down workflow without improving the product. On the other hand, upgrading partial data later could be more costly than "doing it right" from the first.

3.11 Holdings Information

Agree on when holdings information will be added.

Monographic holdings can easily be input into local fields, but sets/serials require complex and standardized formatting.

4.0 Department Workflow

This section describes the organization of the unit.

4.1 Unit Organization

Create a hierarchical structure for supervision and/or a team-approach for peer input.

4.2 Interface with Library Units

Define your relationship with other library departments. Cataloging functions may parallel ordering operations, for instance. Determine processing and binding responsibilities. Relate technical services procedures to public service needs.

4.3 Reorganization Plan

State your role in any proposed library reorganization plan, be it physical rearrangement of the collections (which affects processing) or combining of units (with administrative approval) to streamline functions.

4.4 Copy Cataloging

Assign appropriate level staff to copy cataloging, if catalogers perform only original cataloging. Determine related services which support cataloging, such as searching, recataloging, and adding volumes to sets or duplicate copies. Define the role of CRT operators.

4.5 Time-table

Schedule workflow to speed movement of materials, and adhere to time limits set. For example, process volumes while waiting for OCLC cards to arrive. The practice of "holding" books for Library of Congress copy is not recommended. Set priorities for rush items.

4.6 Reclassification

Reclassify materials according to a set pattern, as whenever a new edition is received. A change in the schedules may necessitate reclassification. On-going projects should identify reclassification from local numbers assigned.

4.7 Statistics

Prepare statistical reports useful to others. Break down production by classification for collection development. Show collection size, CRT costs, and maintenance to administrators.

5.0 Special Materials

This section discusses material given special treatment.

5.1 Documents

Determine who will process these items. Consider the impact of AACR2 on documents cataloging,²³ and the use of GPO copy available in the OCLC data base.²⁴ More state documents are being cataloged through cooperative arrangements, using the OCLC network. Decide which classification scheme will be used for shelf arranging for different categories.

5.2 Theses

Integrate dissertation cataloging into departmental workflow. For local theses, keep a depository copy which is not lent; provide special access points (as date degree granted and department) for reference purposes.²⁵

5.3 Special Collections

Establish procedures for special collections materials. Rare books and archives frequently receive no markings, with acid-free envelopes and slips to preserve them.

5.4 Vertical File

Identify materials not to be cataloged. Consider the opinions of others, but realize the limitations imposed on the department -- personnel, resources, etc. Ephemera and brochures are good candidates for the vertical file.

5.5 Storage Items

Request that storage items be weeded or processed to use, because of space limitations.

5.6 Microforms

Determine practice for cataloging microforms. Describe the original and add a note about the reproduction,²⁶ or describe the reproduction with an optional note about the original. Use services of the Association of Research Libraries Microform Cataloging Clearinghouse if applicable.

5.7 Current Volume Reference

Institute special processes as needed. For example, designate items "current volume reference" when current editions are needed for reference purposes. Library use only is advisable for some items because of their nature, format, or usage; create a "non-circulating" category if needed.

5.8 Special Formats

Establish a policy for access to maps, sound recordings, scores, audiovisual materials, and so forth.

6.0 OCLC Usage

6.1 Standards

Follow high cataloging standards as a network member for quality control. Adhere to guidelines issued by OCLC and the regional networks. Acceptance of MARC records pre-determines a pattern, although minimal level cataloging is gaining acceptance for certain materials.

6.2 Format

Determine coding for appropriate format. Set up procedure for notifying network for records with wrong format.

6.3 Library Symbol

Input or use the correct OCLC record for cataloging, since a transaction automatically logs the library's symbol for interlibrary loan purposes.²⁷ Choose among duplicate records to determine any variations in edition or printing.²⁸ Follow catalogers' judgment or establish guidelines for staff. Develop procedures for correcting discrepancies when discovered, removing symbol from discarded items, and adjusting holdings symbol when replacements result in receipt of variant editions. Remember that this transaction will result in a corresponding record in an online system which can be used.

6.4 Cooperative Cataloging

Consider accepting more cooperative cataloging²⁹ by national (foreign) and major libraries, such as COMARC records.

6.5 Dashed-On Collections

Determine whether to continue manually dashing-on holdings in various locations, or to order separate OCLC card sets for each location in order to receive the correct number of cards; determine impact of this policy on an online catalog.

6.6 Supplements

Generate a separate record when access points for a supplement differ from the main work, and provide an access point to link the work to the original. Apply this practice retrospectively for automating files. Determine treatment and binding before processing is begun for these items.

6.7 Branch Libraries

Develop a comprehensive policy for access to collections of departmental libraries with regard to automation efforts.³⁰

It is suggested that separate card sets be ordered on OCLC, if the number of branches is not great, so that users can distinguish these holdings from those housed in the main library.

6.8 Photocopies

Follow the pattern established for microreproductions: see 5.6 for microforms. It is suggested that copy-specific information be used for items published "on demand" since data about the original does not change between issues.

7.0 Classification

7.1 Bibliographies

Classify bibliographies in Z to keep this form together or scatter them with the subjects.³¹⁻³² Processing is speeded by using the complete Z call number rather than a partial alternate number, and bibliographic tools are kept together; however, split reference collections may favor the other way.

7.2 Language and Literature

Classify language and literature by nationality for academic libraries with large collections, since a complete call number is now available. Others may prefer PZ class.³³

7.3 Juvenile Collection

Determine classifications: for example, class literature in PZ and scatter non-fiction if usage favors this practice.

Define the term "juvenile" for local usage. For example, it may be used for materials for children and adolescents but not for teaching tools.

7.4 Institutional Items

Expand a schedule for local usage only when the collection is large and needs to be together. Suppress call numbers for networking (using field 099 on OCLC) to avoid conflicts with published schedules.

7.5 Analyzed Sets Jointly Classified

Analyze sets with distinctive titles, but jointly classify based on Library of Congress pattern; reference librarians may favor this approach, since it provides special access but keeps volumes side-by-side.

7.6 Local Schemes

Apply local practice for call number length, Cuttering variations, and shelflisting by date. Decide policy based on demonstrated local needs tempered with a desire to accept as much cataloging as is.

8.0 Descriptive Cataloging

8.1 Descriptive Form

Determine code to be used. Some libraries do all cataloging in AACR2, while others use the new rules for original cataloging. Changing codes requires time and knowledge of minute detail, so paraprofessionals often are taught to accept the format (AACR1, ISBD, AACR2) given.

8.2 Spacing and Capitalization

Avoid changing spacing and capitalization, unless spacing affects retrieval.

8.3 Abbreviations and Numerals

Follow standard abbreviation and numeral lists.
Suggestion: use English equivalents for call number terms.

8.4 Editions and Printings

Develop criteria for distinguishing printings and editions. Deal in particular with foreign imprints, facsimiles, and reprints.

8.5 Source of Information

Determine acceptable sources, and appropriate citations.

8.6 Imprints

Establish need for data, such as date (for subarrangement) and place, with a list of useful bibliographic tools.

8.7 Collation

Limit details to those necessary for identification purposes. Profile oversize dimensions, if shelved separately.

8.8 Notes

Consider accepting notes unless wrong. Supply contents for multi-volume sets with distinctive titles.

8.9 Access Points Explained in Description

Explain all access points, except perhaps subjects, to show relationship of entries to work -- an implied practice seldom stated. Suggestion: explain subjects for archival works.

9.0 Backlog Control

The frequently-discussed topic of cataloging backlogs is hardly mentioned in the literature. Does the term "arrearage" have less negative connotations? In any case, eliminating backlogs is a prime concern for collection access.

9.1 Backlog Definition

Define backlog for control purposes, in order to progressively reduce its size. For statistics, one could consider as backlog those currently-received items held in the department more than a month.

9.2 Cataloging Sort

Sorting by categories is traditionally divided as follows: MARC copy, records based on CIP or Library of Congress cataloging, variant editions, contributor copy, original input. Searching OCLC by cycles is the norm.³⁴ It is highly recommended that this process be abandoned quickly; process the standardized copy, then proceed to other categories (in the order given) after searching is done.

9.3 Cataloging Priorities

Establish local priorities, based on the following parameters: size of collections, workload involved, value of items to users, needs of other library units, spatial considerations, recataloging projects underway, and staff availability. Take a cue from LC's recent list.³⁵

A sample list of priorities might be as follows: (1) rush items; (2) other books and serials, whether orders or gifts; (3) depository material; (4) standing orders separately cataloged; (5) materials currently accessed only in internal files; (6) local theses; (7) items requiring special handling; (8) other formats--microforms, recordings, maps, audiovisuals; (9) problems, as non-Roman alphabet. Consult others beforehand.

COMMENTARY

All the above guidelines cover issues involved in the formulation of a library's written collection access policy. Managing the catalog department³⁶ today requires much decision making. The complexity of catalogs and the amount of maintenance involved have a profound impact on cataloging costs.³⁷ As the nature of the catalog changes from manual files traditionally accessed to indexing using search keys,³⁸ usage of automated systems must become increasingly sophisticated to enhance retrieval of information.³⁹ Whether catalogers of the future will merge into integrated subject units or serve as generalists supporting reintegrated functions may depend on local economies of scale.⁴⁰ Those library faculty who are specialist-teacher-researcher-professional-manager all-in-one will reaffirm our role in academia.⁴¹ In conclusion, as a result of these external forces, catalogers will become information specialists, responsible for data base management. The "key word" will be access.

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